

ESTIMATED RELOCATION EXPENSE WORKSHEET

This worksheet provides the necessary guidance to help you and your funding organization estimate the cost of your relocation with the exception of Relocation Income Tax Allowance (RITA), Federal Insurance Contributions Act (FICA), and Health Insurance Tax (HIT). This worksheet will be used by the Finance Office to enter your move in the Integrated Travel Manager Relocation (ITMR) system and to obligate your move in the Core Financial System (CFS). The RITA, FICA, and HIT will be calculated by the ITMR system and obligated in the CFS. The estimates in this worksheet should also be used when completing your Authorizing Travel Order Form CD-29.

This form is intended to be a tool to help estimate the cost of the move and create the obligation. It does not replace the CD-29 as the official travel authorization or denote eligibility to these entitlements. For more detailed information regarding a relocation, go to the Finance Office Travel Web Page at <http://www.rdc.noaa.gov/~finance/travel.htm> and click on Relocation.

This form must be completed and submitted through your authorizing Line/Staff Office to the Finance Office along with your Authorizing Travel Order, Form CD-29 and a copy of the Request for Authorization of Travel and Moving Expenses, Form CD-150.

For assistance completing this form, please contact the PCS Specialist located in the Finance Office servicing your new duty station:

Transferee's New Duty Station Serviced by:

Eastern Administrative Support Center (EASC)
Central Administrative Support Center (CASC)
Mountain Administrative Support Center (MASC)
Western Administrative Support Center (WASC)
Accounting Operations Division (AOD)

Telephone Number

(757) 441-6527 Wanda Gonsalves
(816) 426-7543 x418/438 Debbie Ferrara / Donna Newport
(303) 497-6199 Steve Tatum
(206) 526-4426 Deanna Trosper
(301) 444-2782 Nanette Naylor-Bah

NAME: _____ SSN: _____ Travel Order #: _____

MAILING ADDRESS: _____

CITY: _____ STATE: _____ ZIP: _____

If amending the original order, enter an amendment sequence number here (1, 2, 3.....) Amendment Seq. # _____

Explain the reason for the amendment: _____

I. GENERAL INFORMATION: The following information is REQUIRED in order to determine the appropriate relocation entitlements, tax calculations, and to correctly obligate your relocation expenses.

Retirement Plan: ☐ CSRS ☐ FERS ☐ Other (CSRS-OFFSET)

Filing Status: ☐ Married Filing Separately ☐ Single
☐ Married Filing Jointly ☐ Head of Household

Estimated Annual Earnings: Employee _____ Self Employed _____
Spouse _____ Self Employed _____

Tax State: _____

Tax Rates (if known) Percentage: _____ Expressed as a % of:
County _____ ☐ Income ☐ Federal Tax ☐ State Tax
City _____ ☐ Income ☐ Federal Tax ☐ State Tax
Other _____ ☐ Income ☐ Federal Tax ☐ State Tax

Relocation Special Status: ☐ None (All Transfers not covered by one of the following)
☐ New Appointee (*New Employees should complete Sections I, III, V, VII, and X only*)
☐ Last Move (*SES Employees only*)
☐ Overseas Tour Renewal
☐ Return for Purpose of Separation
☐ Reduction in Force

Distance: Old Residence to Old Duty Station _____
Old Residence to New Duty Station _____
Old Duty Station to New Duty Station _____

II. HOUSEHUNTING TRIP (FTR 302-5): Maximum of 10 days can be authorized. For CONUS, per diem rates for househunting may be at the current locality rate (*) *but only if specifically approved* on the travel order. Otherwise, the standard CONUS rate of \$55 for Lodging and \$31 for M&IE applies. When driving by POV, calculate per diem based on driving 300 miles per day.

Approximate Travel Dates: Begin _____ End _____
Rate Authorized: ☐ CONUS Rate ☐ OCONUS
Daily Rate(*): Lodging _____ M&IE _____

* To determine the locality rates go to the GSA web page at <http://policyworks.gov/> and click on Per Diem Rates.

Cost of Per Diem -Use either Method 1 or Method 2.

Method 1: Use when the employee takes the househunting trip alone or when both the employee and spouse take the househunting trip together or traveling separately.

LODGING

Employee:

Daily lodging rate \$ _____ x _____ # of nights \$ _____

Spouse accompanying or traveling separately from the employee:

Employee lodging total \$ _____ x .75 \$ _____

M&IE:

Employee:

First & Last Days:

Daily M&IE rate \$ _____ x _____ # of days x .75 \$ _____

Full Days:

Daily M&IE rate \$ _____ x _____ # of days \$ _____

Total Employee M&IE \$ _____

Spouse accompanying or traveling separately from the employee:

Employee M&IE total \$ _____ x .75 \$ _____

Total Per Diem (Lodging and M&IE) using Method 1

\$ _____

Copy to Section X(i)

Method 2: Use this method when the spouse travels in place of the employee. (Computed at the same rate as the employee.)

LODGING

Spouse traveling in place of employee:

Daily lodging rate \$ _____ x _____ # of nights \$ _____

M&IE

Spouse traveling in place of employee:

First & Last Days: Daily M&IE rate \$ _____ x _____ # of days x .75 \$ _____

Full Days: Daily M&IE rate \$ _____ x _____ # of days \$ _____

Total Per Diem (Lodging and M&IE) using Method 2

\$ _____

Copy to Section X (i)

Cost of Transportation.

Common Carrier: (Charged to either CBA or Citibank travel card)

\$ _____

Copy to Section X (a)

Other Transportation:

POV- *Rate determined by the number of occupants in the vehicle– one occupant @ 15¢ per mile or two occupants @ 17¢ per mile.*

of miles _____ x _____ ¢ per mile \$ _____

Taxi Fares \$ _____

Rental Car \$ _____

Total Other Transportation

\$ _____

Copy to Section X (g)

Other (Miscellaneous) Expenses (tolls, parking, fuel, etc...)

\$ _____

Copy to Section X (k)

TOTAL OF HOUSEHUNTING TRIP

\$ _____

III. TRAVEL EN ROUTE TO NEW DUTY STATION (FTR 302-4) - When driving by POV, calculate per diem based on driving the required minimum of 300 miles per day. *Maximum per diem rates for travel enroute to new duty stations: CONUS - \$85 (Lodging \$55, M&IE \$31); OCONUS - locality rate.*

Approximate Travel Dates: Begin _____ End _____

Rate Authorized: ☐ CONUS Rate ☐ OCONUS

Daily Rate(*): Lodging _____ M&IE _____

* To determine the locality rates go to the GSA web page at <http://policyworks.gov/> and click on Per Diem Rates.

Cost of Per Diem-Immediate family members of new hires are not entitled to per diem (lodging and M&IE).

LODGING

Employee:

Daily lodging rate \$ _____ x _____ # of nights _____ \$ _____

Spouse - *Use either Method 1 or Method 2.*

Method 1 - Spouse accompanying the employee

Employee lodging total \$_____ x .75 \$_____

Method 2 -. When spouse is traveling separately from employee, lodging is computed on the same rate basis as the employee shown above

Enter employee lodging total \$_____

Dependents 12 years of age & over:

of dependents _____ x employee lodging total \$ _____ x .75 \$ _____

Dependents under 12 years of age: compute as follows:

of dependents _____ x employee lodging total \$ _____ x .50 \$ _____

M&IE

Employee:

First & Last: Daily M&IE rate \$_____ x _____ # of days x .75 \$_____

Full Days: Daily M&IE rate \$_____ x _____ # of days \$_____

Total Employee M&IE \$_____

Spouse: *Use either Method 1 or Method 2.*

Method 1 - Spouse accompanying the employee

Employee M&IE total \$_____ x .75 \$_____

Method 2 - When spouse is traveling separately from employee, M&IE is computed on the same rate basis as the employee shown above.

Enter Total Employee M&IE \$ _____

Dependent 12 years of age & over:

of dependents _____ x employee M&IE total \$_____ x .75 \$_____

Dependent under 12 years of age: compute as follows:

of dependents _____ x employee M&IE total \$ _____ x .50 \$ _____

Total Per Diem (Lodging and M&IE) for Enroute \$_____

Copy to Section X (j)

Cost of Transportation.

Common Carrier (Charged to either CBA or Citibank travel card) \$_____

Copy to Section X (b)

Other Transportation

POV -Rate determined by the number of occupants in the vehicle:

*One occupant @ 15¢ per mile, two occupants @ 17¢ per mile,
three occupants @ 19¢ per mile, and four or more occupants @ 20¢ per mile*

POV 1 # of miles _____ x _____ ¢ per mile \$ _____

POV 2	# of miles	x	¢ per mile	\$
-------	------------	---	------------	----

\$_____

Copy to Section X (h)

Other (Miscellaneous) Expenses (tolls, parking, etc...) \$

Copy to Section X (I)

TOTAL ENROUTE TRIP	\$
---------------------------	-----------

IV. COST OF SUBSISTENCE WHILE OCCUPYING TEMPORARY QUARTERS (FTR 302-6) - Maximum Employee rates for temporary quarters: **CONUS** - \$55 for Lodging and \$31 for M&IE; **OCONUS** - locality rate.

Approximate Begin Date: _____

Rate Authorized: ☐ CONUS Rate

☐ OCONUS

Daily Rate(*): Lodging _____

M&IE _____

* To determine the locality rates go to the GSA web page at <http://policyworks.gov/> and click on Per Diem Rates

First 30 days: *Use Method 1 or Method 2*

LODGING:

Method 1: Use this method when one or two family members are occupying temporary quarters.

Employee: Daily lodging rate \$ _____ x _____ # of nights \$ _____

Spouse: Daily lodging rate \$ _____ x .75 x _____ # of nights \$ _____

Dependents 12 yrs & over:

Daily lodging rate \$ _____ x _____ # of dependents x _____ # of nights x .75 \$ _____

Dependents under 12 yrs:

Daily lodging rate \$ _____ x _____ # of dependents x _____ # of nights x .50 \$ _____

Method 2: Use this method when two or more family members are occupying temporary quarters. The above formula (while based on maximum allowances) could be over estimating temporary quarters costs. This method allows you to estimate lodging cost based on the actual lodging rate when it is known.

Actual daily lodging rate \$ _____ x _____ # of nights \$ _____

M&IE

Employee: Daily M&IE rate \$ _____ x _____ # of days \$ _____

Spouse: Daily M&IE rate \$ _____ x .75 x _____ # of days \$ _____

Dependents 12 yrs & over:

Daily M&IE rate \$ _____ x .75 x _____ # of dependents x _____ # of days \$ _____

Dependents under 12 yrs:

Daily M&IE rate \$ _____ x .50 x _____ # of dependents x _____ # of days \$ _____

Total Per Diem (Lodging and M&IE) for the first 30 days Temporary Quarters \$ _____

31 to 60 days (When authorized):

LODGING

Employee: Daily lodging rate \$ _____ x .75 x _____ # of days \$ _____

Spouse: Daily lodging rate \$ _____ x .50 x _____ # of days \$ _____

Dependents 12 yrs & over:

Daily lodging rate \$ _____ x .50 x _____ # of dependents x _____ # of days \$ _____

Dependents under 12 yrs:

Daily lodging rate \$ _____ x .40 x _____ # of dependents x _____ # of days \$ _____

M&IE

Employee: Daily M&IE rate \$ _____ x .75 x _____ # of days \$ _____

Spouse: Daily M&IE rate \$ _____ x .50 x _____ # of days \$ _____

Dependents 12 yrs & over:

Daily M&IE rate \$ _____ x .50 x _____ # of dependents x _____ # of days \$ _____

Dependents under 12 yrs:

Daily M&IE rate \$ _____ x .40 x _____ # of dependents x _____ # of days \$ _____

Total Per Diem (Lodging and M&IE) for the 31-60 days Temporary Quarters \$ _____

AMENDMENTS ONLY

61 to 90 days (When authorized) - (Computed at same rate as 31-60 days) \$ _____

91 to 120 days (When authorized) - (Computed at same rate as 31-60 days) \$ _____

TOTAL TEMPORARY QUARTERS:

\$ _____

Copy to Section X (n)

V. TRANSPORTATION OF HOUSEHOLD GOODS (MAX. 18,000 lbs.) & TEMPORARY STORAGE (90 DAYS) (FTR.302-7): When an employee chooses to move his possessions himself he is reimbursed at the commuted rate. Contact your servicing transportation specialist for an estimate on household goods:

Transferee's New Duty Station Serviced by:

Eastern Administrative Support Center (EASC)
Central Administrative Support Center (CASC)
Mountain Administrative Support Center (MASC)
Western Administrative Support Center (WASC)
Accounting Operations Division (AOD)

Telephone Number

(757) 441-6468
(816) 426-7543 x418/438
(303) 497-6199
(206) 526-6394
(301) 713-3522 x162

Anita Holley
Debbie Ferrara / Donna Newport
Steve Tatum
Chris Donahue
Charlie Hill

Transportation and Storage of Household Goods

Commercial Bill of Lading

Shipping of Household Goods \$ _____

Mobile Home Transportation (in lieu of household goods transaction) \$ _____

Total Transportation Billed to Government \$ _____

Copy to Section X (c)

Temporary Storage of Household Goods \$ _____

Copy to Section X (e)

Commuted

Shipping of Household Goods \$ _____

Mobile Home Transportation (in lieu of household goods transaction) \$ _____

Total transportation paid to employee \$ _____

Copy to Section X (o)

Temporary Storage of Household Goods \$ _____

Copy to Section X (q)

TOTAL TRANSPORTATION AND STORAGE OF HOUSEHOLD GOODS \$ _____

VI. EXTENDED STORAGE OF HOUSEHOLD GOODS (FTR 302-8)

Commercial Bill of Lading

Extended Storage of Household Goods \$ _____

Copy to Section X (f)

Commuted

Extended Storage of Household Goods \$ _____

Copy to Section X (r)

TOTAL EXTENDED STORAGE OF HOUSEHOLD GOODS \$ _____

VII. TRANSPORTATION OF POV (FTR 302-9) - *Select only one.*

Commercial Bill of Lading

Transportation of POV \$ _____

Copy to Section X (d)

Commuted

Transportation of POV \$ _____

Copy to Section X (p)

TOTAL TRANSPORTATION OF POV \$ _____

VIII. REAL ESTATE (FTR 302-11 & 302-12)

Old Residence - *Select only one.*

NOAA's Home Sale Program: (Costs for NOAA's home sale/home purchase program will be obligated under the Travel Order Number by Finance.)

Buyer Value Option (day 1-60; buyer found):
Selling price of old residence _____ x .1099 \$ _____

Amended Sale (after appraisals are ordered; buyer found):
Selling price of old residence _____ x .1304 \$ _____

Appraised Sale (after 90 days; relocation company buys the home):
Selling price of old residence _____ x .2264 \$ _____

Traditional Sale
Estimated selling price of your old residence _____ x .10 \$ _____

Lease Breaking Expenses at Old Duty Station \$ _____
(No property to sell)

Property Management Service \$ _____

New Residence - *Select only one.*

NOAA's Home Purchase Program:
Estimated purchase price of new residence _____ x .05 \$ _____
(No fee for service)

Traditional Purchase
Estimated Purchase price of new residence _____ x .05 \$ _____

TOTAL REAL ESTATE \$ _____

Copy to Section X (s)

IX. MISCELLANEOUS EXPENSE ALLOWANCE (FTR 302-16) - *Select only one.*

Employee's Weekly Gross Income: _____

Employee only (\$500) \$ _____

OR

Employee with immediate family (\$1,000) \$ _____

TOTAL MISCELLANEOUS EXPENSE ALLOWANCE \$ _____

Copy to Section X (m)

X. ESTIMATES FOR FORM CD-29

		Enter these Totals in Block 11 of the CD-29:
SECTION A		
TRANSPORTATION (All expenses billed directly to the Government)	Common Carrier (Object Class 2143) Househunting (a) _____ Enroute (b) _____ Transportation of Household Goods-GBL (Object Class 2211) (c) _____ Transportation of POV-GBL (Object Class 2211) (d) _____ Storage of Household Goods-GBL (Object Class 2528) (e) _____ Extended Storage of Household Goods-GBL (Object Class 2528) (f) _____	\$
SECTION B		
OTHER TRANSPORTATION	Mileage, Taxi, Shuttle, Rental Car (Object Class 2140) Househunting (g) _____ Enroute (h) _____	\$
SUBSISTENCE EXPENSE	Per Diem (Object Class 2140) Househunting (i) _____ Enroute (j) _____	\$
OTHER EXPENSES	Miscellaneous Expenses (Object Class 2140) Househunting (k) _____ Enroute (l) _____ Miscellaneous Expense Allowance (Object Class 1216) (m) _____	\$
TEMPORARY QUARTERS	Temporary Quarters (Object Class 1209) (n) _____	\$
RELOCATION EXPENSES	Transportation Household Goods-Commuted (Object Class 2211) (o) _____ Transportation of POV-Commuted (Object Class 2211) (p) _____ Storage of Household Goods-Commuted (Object Class 2528) (q) _____ Extended Storage of Household Goods-Commuted (Object Class 2528) (r) _____ Real Estate (Object Class 1214) (s) _____	\$
SUB-TOTAL B		\$
TOTAL A & B		\$